# SI digital portfolio

## Application

Implementing technology projects

SI | Sourcing International®

# Summary

Digital products and services

# Introduction

# 01

# Introduction

Our portfolio includes digital products, like websites and web applications. We used methodologies like Kanban flow and SCRUM, as well as Agile UX to manage development activities.

A variety of client projects insured we put our skills to good use.
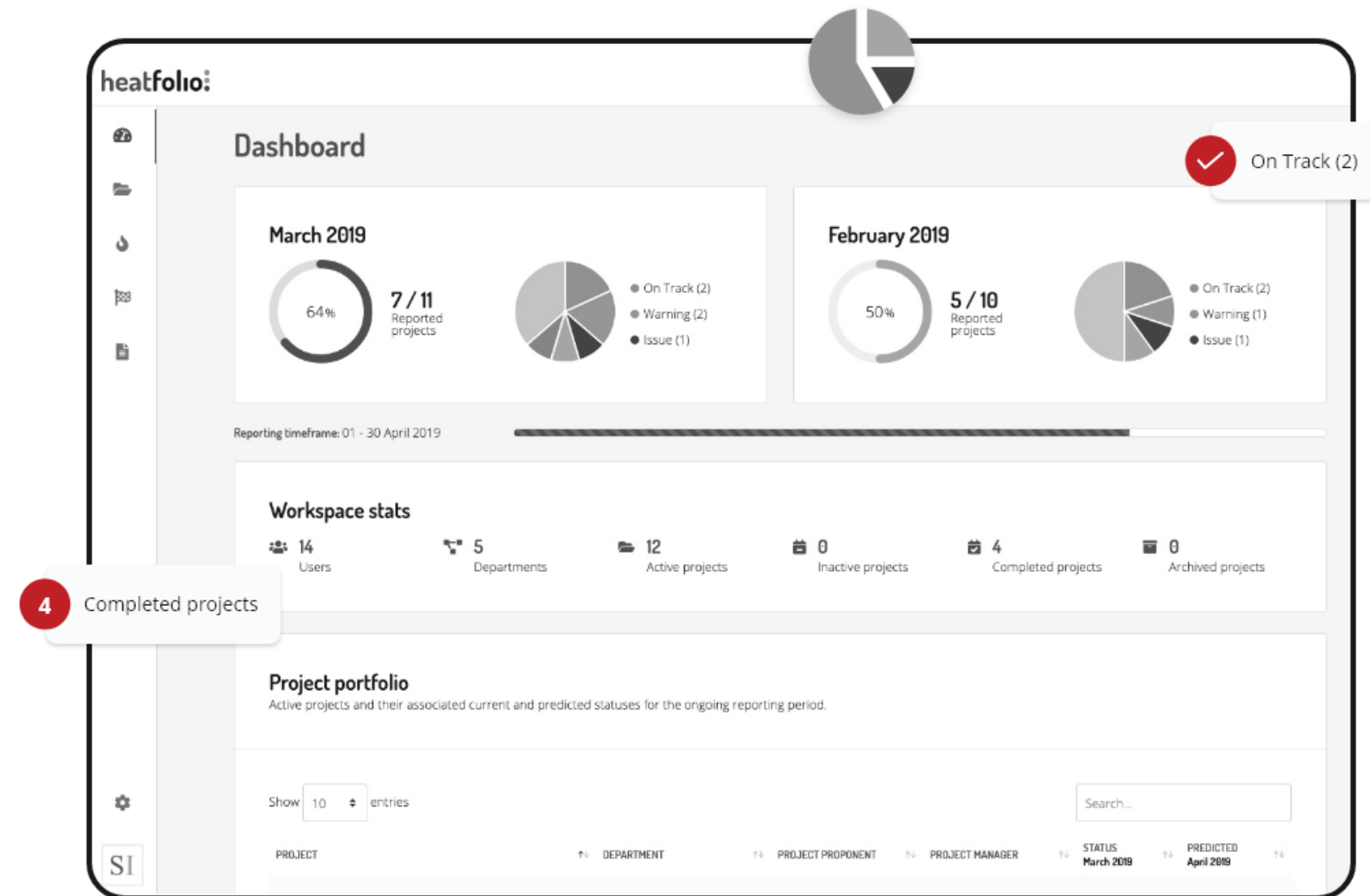
# heatfolio

# 02

# heatfolio

## Transforming portfolio reporting with heatfolio

In the fast-paced world of enterprise solutions, Sourcing International developed heatfolio, an innovative SaaS tool transforming management and reporting for companies with diverse and extensive portfolios.

## Outcome

Our first customer reported efficient tracking and doubled their project portfolio. All that with minimal customer onboarding and a self-explanatory interface.

# heatfolio

## The problem

As companies grow, managing various projects simultaneously becomes a daunting task. We identified a common challenge faced by top management in an energy company. The inability to efficiently track the progress of both small and multimillion-dollar projects.

The traditional status reporting methods involve many meetings, emails, and complex spreadsheets. That leads to information overload and inefficiency.
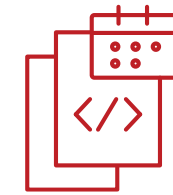
# heatfolio

## The idea

Sourcing International envisioned a solution that would streamline project reporting—focusing on essential information and presenting it in a visually intuitive format. The concept was born in early 2018. To combine and simplify project status reports into a single, easy-to-read heatmap view.
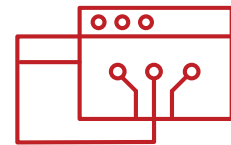
## The MVP

Sourcing International swiftly developed a Minimum Viable Product (MVP) to validate the concept. That involved digitizing the project portfolio reporting process. The initial version integrated an online form into a website. That created a seamless experience for project managers. Although data processing was initially manual, positive feedback and increased demand validated the viability of this approach in 2 to 3 months.

## The momentum

The pivotal moment came when the first customer experienced success with Heatfolio. They doubled their project count and involved additional departments. We planned processes, workflows, and technical aspects, overcoming challenges with determination. The second half of 2018 saw significant progress, marking the resolution of hurdles and the online launch of heatfolio.

# heatfolio

## The launch

In 2019, heatfolio officially entered the market. Comprehensive documentation and user training ensure a smooth onboarding experience. We made continuous efforts to refine the application and introduce new features. Behind the app, there is a dedicated team with a clear roadmap for the future.
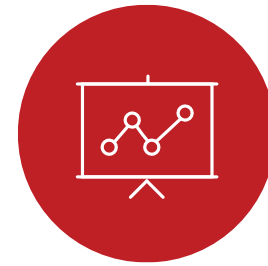
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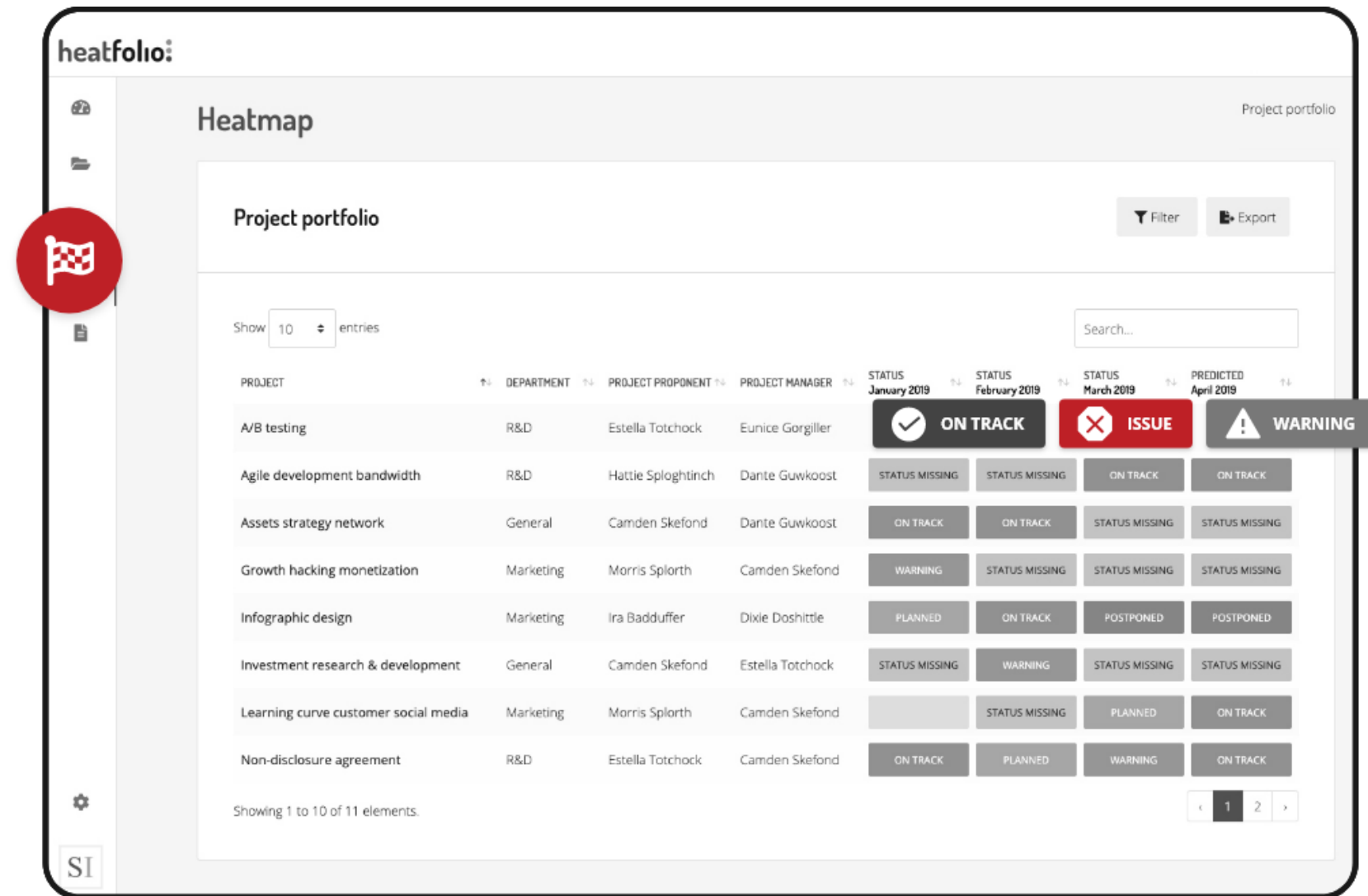
## Key features

### Overview and foresight

- Track every project in a single view.
- Anticipate issues ahead of time.

### History and depth

- Browse previous data reports.
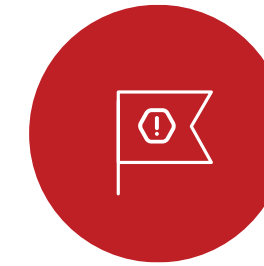- Expose only relevant details for informed decision-making.

### Collaboration

- Enable teamwork and seamless information sharing.
- Extend project access to external partners or different companies.

### Comprehensive reporting

- Focus on two periods: current and predicted.
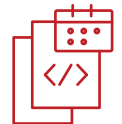- Intuitive, fast, and extremely time-efficient.

### The status of time, costs, and content

- Drill down into project details in case of potential flaws.
- Flag specific elements affecting the project.

# heatfolio

## Key results

We have successfully onboarded clients with comprehensive documentation, and a set of trainings.

Our first customer was really happy with the tool. The confidence was overwhelming. They doubled the number of projects they had and involved another department.

heatfolio means portfolio reporting made easy. We built it internally and opened it to the public. It has multi-tenancy capabilities. The aim is to become a cloud solution, used by many organizations worldwide.

## The future

heatfolio has successfully transformed the way organizations manage and report on their projects. It offers a dynamic solution that enhances efficiency, collaboration, and strategic decision-making.

The future holds great promise for the application and the companies it serves. The story of heatfolio is not just one of software development. It's one of innovation, perseverance, and the power of transforming challenges into opportunities.

**The best is yet to come.**

# heatfolio

It's working

**TA G**  Trans Austria Gasleitung

"Using heatfolio TAG is able to report the status of its projects in a transparent way. With the focus on scope, costs and time - split into actual and forecast - the Triple Constraint in Project Management is fulfilled, the functionality of RAG-reporting provides management a quick overview. A simple authorisation concept allows reporting by different departments.

The use of the tool is that easy that even newcomers are satisfied with a very short introduction. The implementation of the tool worked smoothly, change requests have been realised in a very professional way. We are looking forward to our next phase of enhancements."
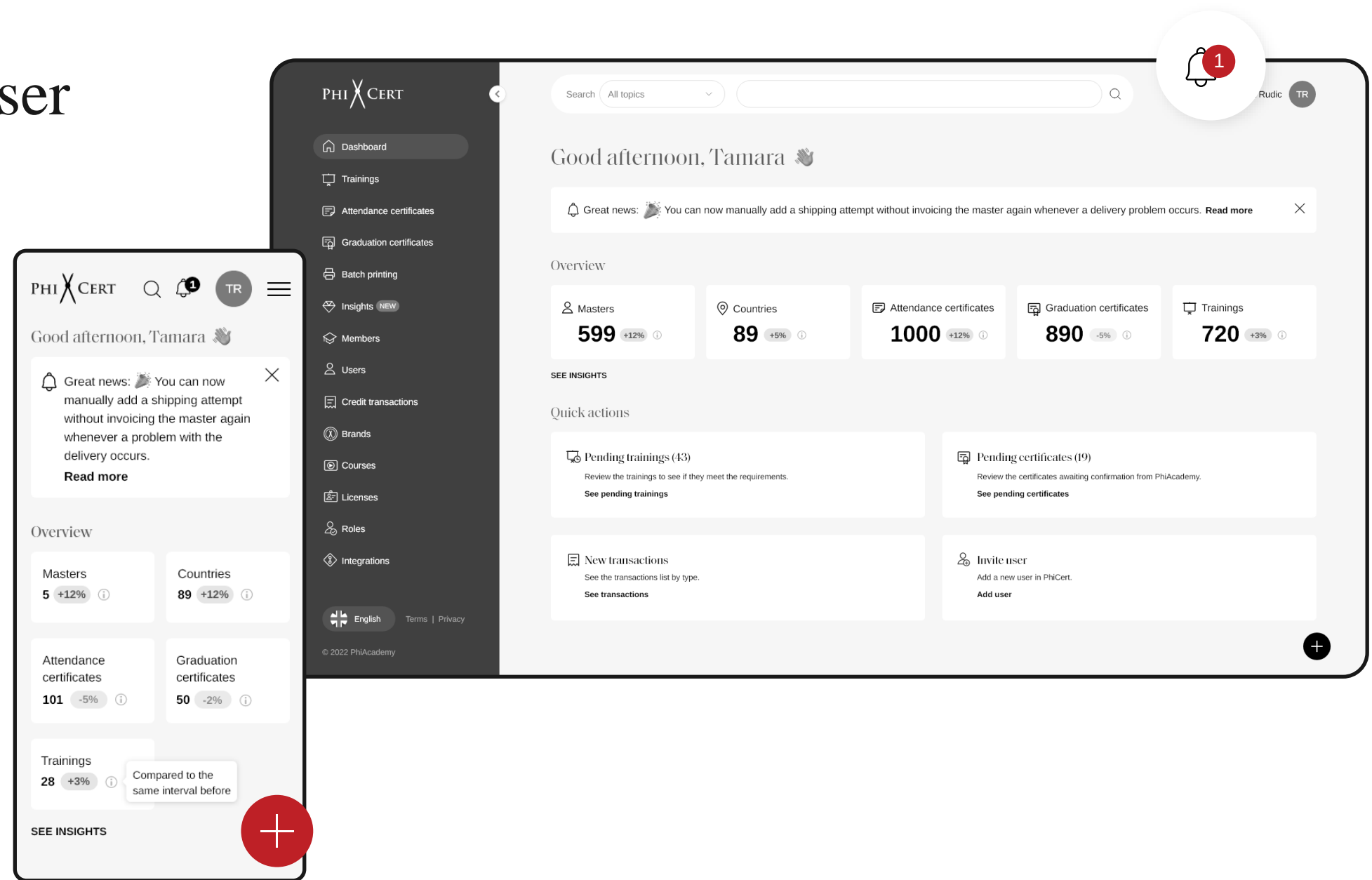
**Angelika Brunar**
Demand & Delivery Manager, Trans Austria Gasleitung GmbH

# PhiCert

# 03

# PhiCert

# Redesign a data platform with a user base all over the world

We revamped a bespoke B2B2C data-heavy management and operations platform. The client is a giant in the beauty industry, with a worldwide user base.

# PhiCert

## Impact and numbers

Designing and building a certification platform with worldwide events, trainers, students, and certificates is no easy feat.

We provided insights, ensured clean data, and helped admins teams in 2 countries juggle huge numbers.

✓ 28.121 certificates

✓ 20.453 active students

✓ 11.073 training events

✓ 560 trainers

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# PhiCert

## Overview

The tool is more than CRM for our client. It hosts a community of trainers who interact with their students. They organize training events worldwide. They provide, track, and validate attendance certificates.

The admins manage the processes and the community. They control licenses and students' access to courses. They guide trainers who need help organizing their pieces of training. Not only that, but they help students get their certificates. As well as keeping everything up to date. Certificates printing, credits, licenses, transactions, brands, courses, and much more. And for a clear overview, they need raw data and analytics.
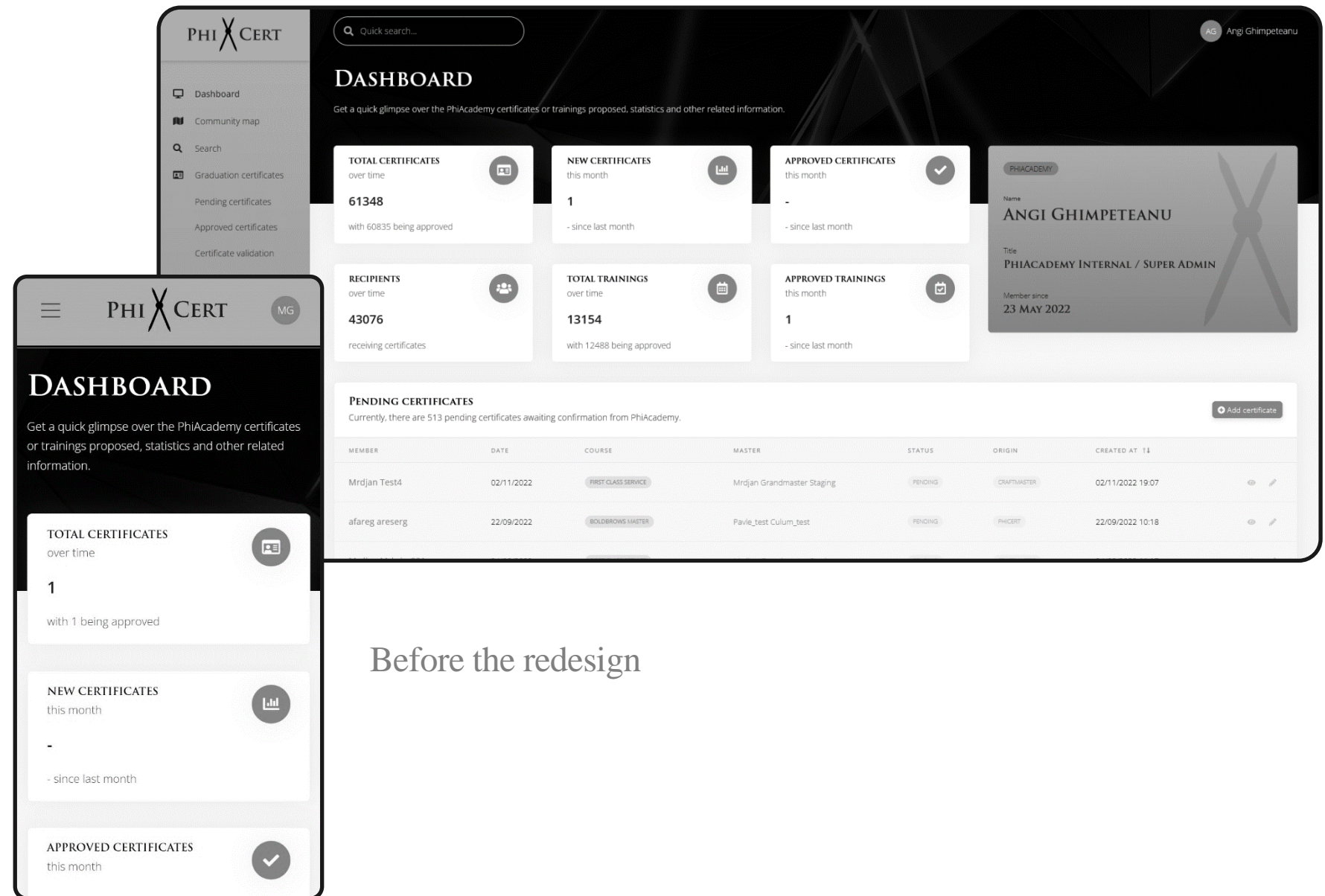
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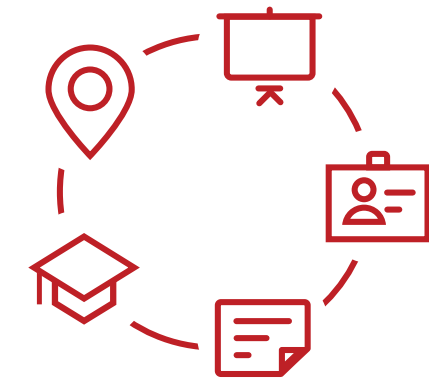
## Why the redesign

New functionalities were added over and over again, to the point where a complete redesign had to be considered. We needed to adapt the way the application functions to all it should be capable of doing.

## The goal

If we were to revamp such a huge platform, we wanted to tick all the boxes. Not only update the interface to integrate all the new functionalities. But also improve the user experience, the overall usability and achieve consistent branding.



Before the redesign

# PhiCert

## Our process

The Sourcing International digital team approached the project using agile UX methodologies and Kanban flow to manage development activities. An agile team of one product manager, 2 developers, and one UX/UI designer worked intensively for half a year towards the ambitious goal.

## The process included:

Analize data (audit)

Interviews

Extract requirements

Design workshops

Lo-fi design

Hi-fi design

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## User experience analysis

The redesign was an opportunity to inspect all the functionalities. To understand the challenges that end users from many groups are facing.

The strategy called for an audit of the entire platform, based on a heuristic evaluation.

Next, we went into the qualitative research phase, interviewing our main user groups: the admins and the trainers. The admins were using the platform on a day-to-day basis. Trainers used the platform frequently as well. The functionality we offered them needed to match their evolving needs.

The result of these interviews was an extensive UX report, the basis of our roadmap features.

### dashboard options

**Tamara R.** Guest
Nov 23, 2022

The version of the dashboard with cards (slide 5) is better than the one on slide 4, easier to navigate

### attendance certificates

**Tamara R.** Guest
Nov 23, 2022

Would it be possible to add another filter when it comes to attendance certificates, one related to a type of licence used? For example, it would be easier to see an overview of all PhiBrows attendance certificates, created for online trainings in a certain period with a Premium license (MoA and MoM are not relevant here, just the type of the kit).

**Tamara R.** Guest
Nov 23, 2022

Could we restrict the Masters to creating attendance certificates for trainings scheduled further in the past? Especially for online trainings, some Masters create a certificate for an online training that has been created a few months earlier, and then we are unable to keep track of the correct number of certificates per month. Now that everyone has got enough credits, I think it could be enough to allow them to create the certificate up to 2 days after the training date, just in case, but not more than that. (the admins should still be allowed to overwrite this, in the case something really unexpected occurs)

Interview with Pavle
24.06.2022

Interview with Masters Orders
09.06.2022

Interview with Vesna and Marijana
09.06.2022

Questions

- Tell me about your typical day.
- What tasks do you usually do?
- What devices do you use?
- Can you share your screen and walk me through a task?
- What are the most challenging tasks?
- How was it when you first started using Phi Cert?
- Where do you go for help?
- Is there any functionality you would need that's missing now?
- Anything else you want to tell me about?

Interview with Ksenija
02.06.2022

Interview with Tamara
01.06.2022

# Task-based approach

The redesign approach is task-based, so we can help people accomplish their goals easier.
We extracted the functional needs from the user's point of view. They are the human and business needs that our product must meet.

# PhiCert

## Challenges

One of the challenges was implementing the new design and developing new features that became a priority. An agile process requires staying flexible and building fast. We covered the initial roadmap with a small team and offered assistance for auxiliary features or issues.

We planned, designed, and coded the entire platform ourselves. Clear planning and organization were the keys to staying on top of our roadmap.

We also needed to stay flexible and make necessary adaptions to the design. The challenges of a new framework lead us to solve difficulties and make the best design decisions creatively.
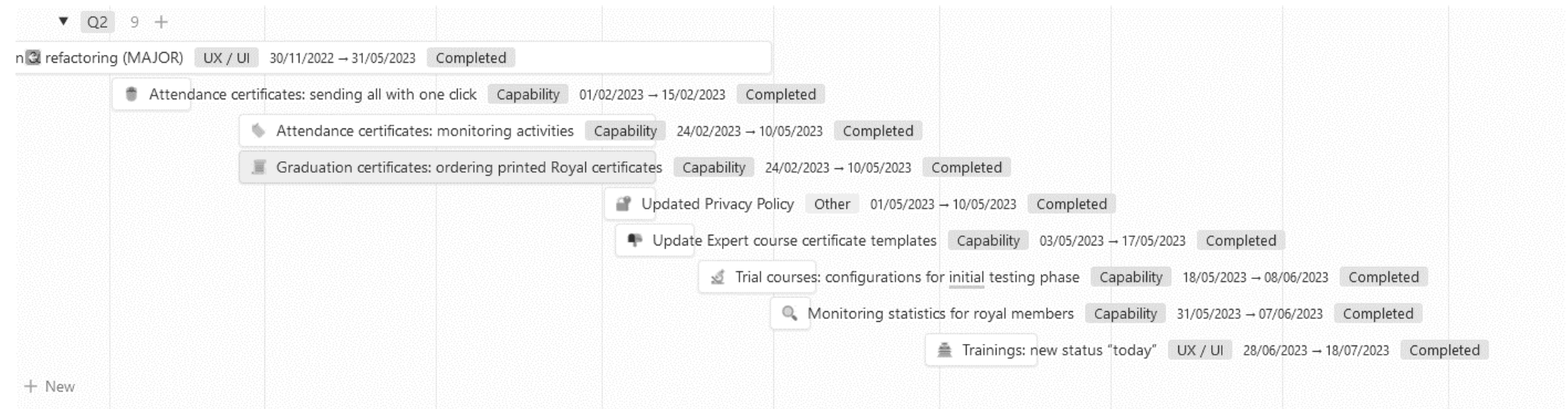


Q2 roadmap

# PhiCert

## The results

The redesign launch was a great and exciting moment, the conclusion of 6 intensive months. New user interface, better flows for all user groups, better API integration, and improved system architecture. We created modules and features with localization in mind. While offering support and operations.

Good afternoon, Maria 👋

💡 Did you know you can see all your stats in the insights section? **More tips**

🔔 Great news: 🎉 Now you can edit students' information yourself. **Read more** ✕

# PhiCert

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## Our key results were

- Reduced cognitive load and faster workflow

- Full system redesign into a seamless interface with improved usability

- Comprehensive user knowledge base

- Announcements-based system for relevant system-related news

- Community map update, interacting with more than 70,000 data points

- Contextual help and tool-tips

- Easier access to the different languages & translated flows

- Implementation of the brand identity, through a consistent style

- Fully dedicated responsive mode, offering a native feel

- Better showcase of a data-heavy interface, in a simple and user-friendly way



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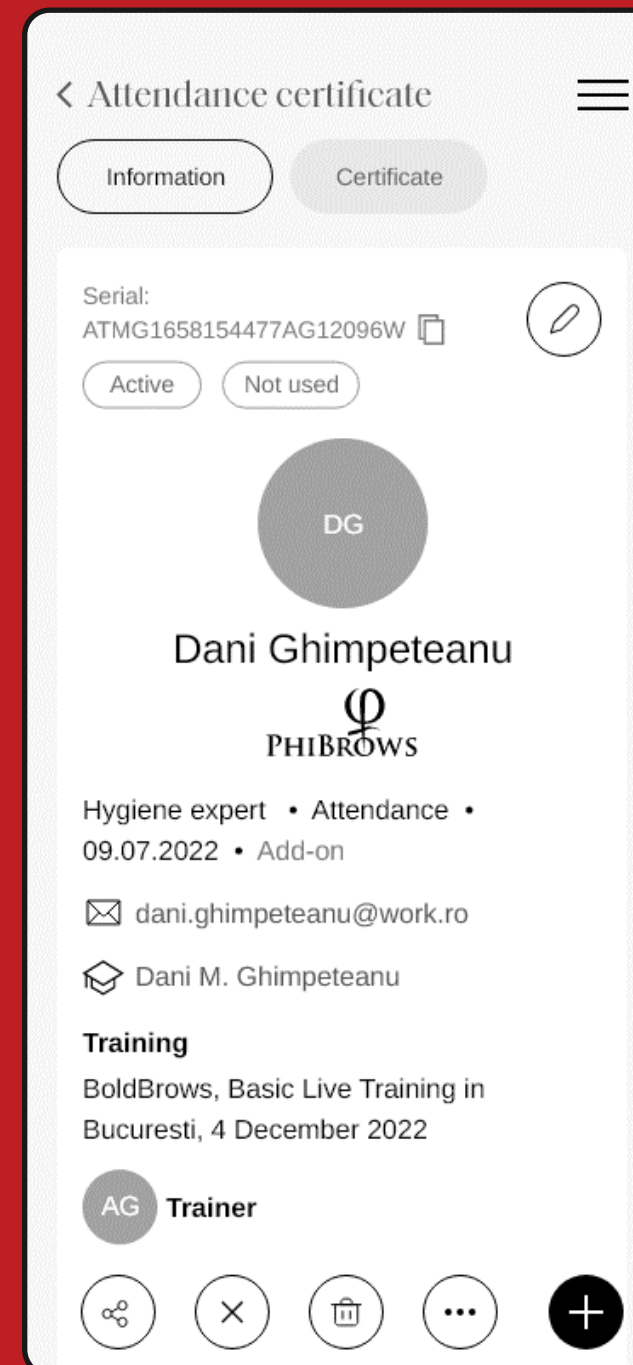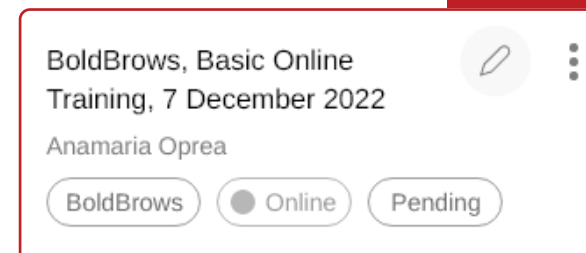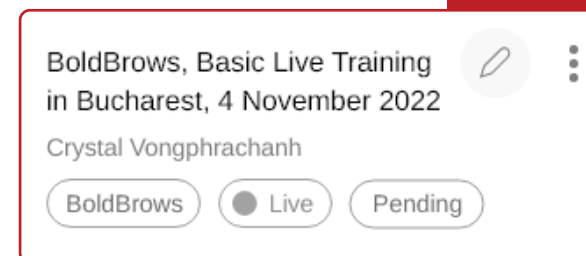# PhiCert

Before

After

# PhiCert
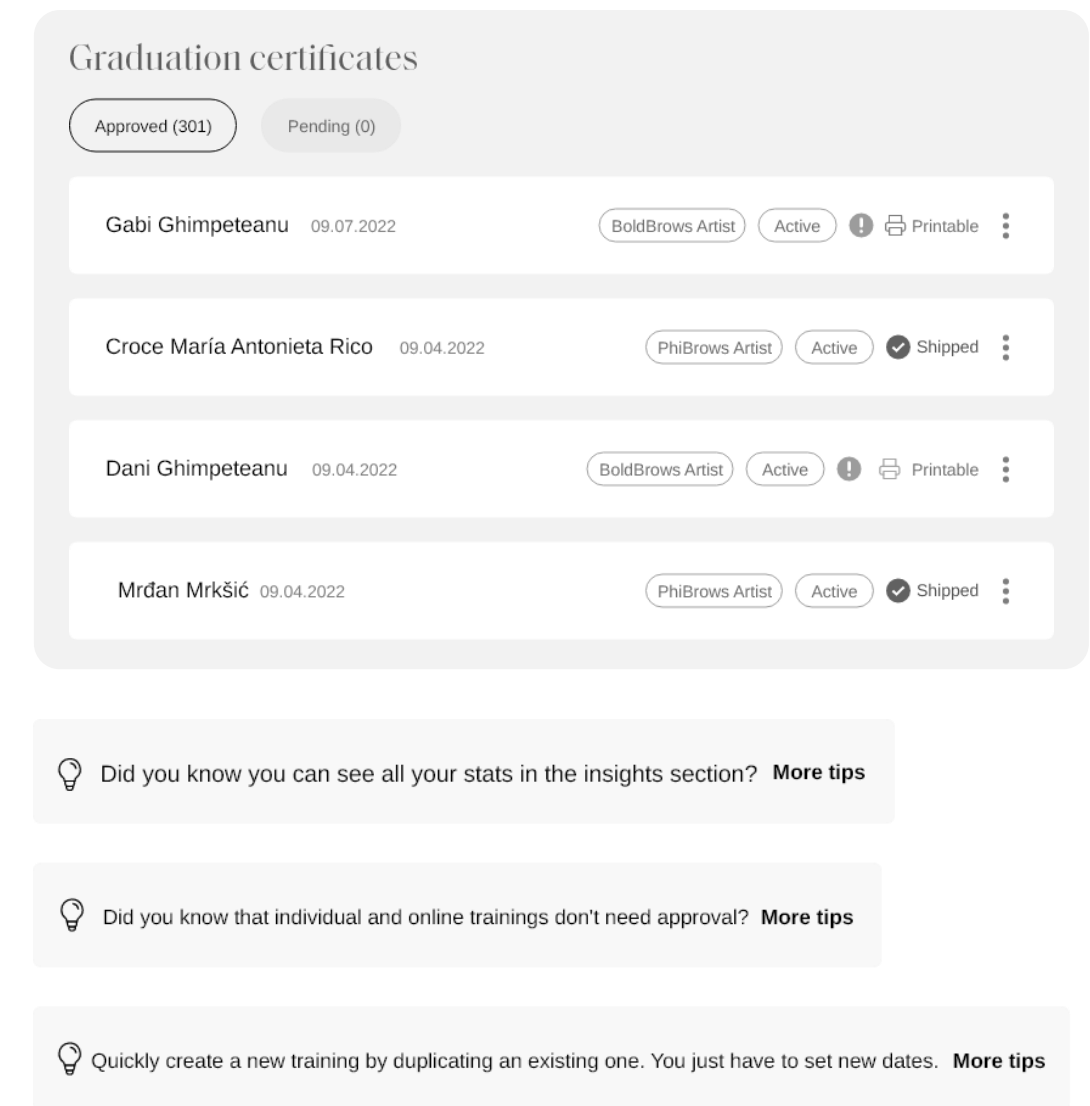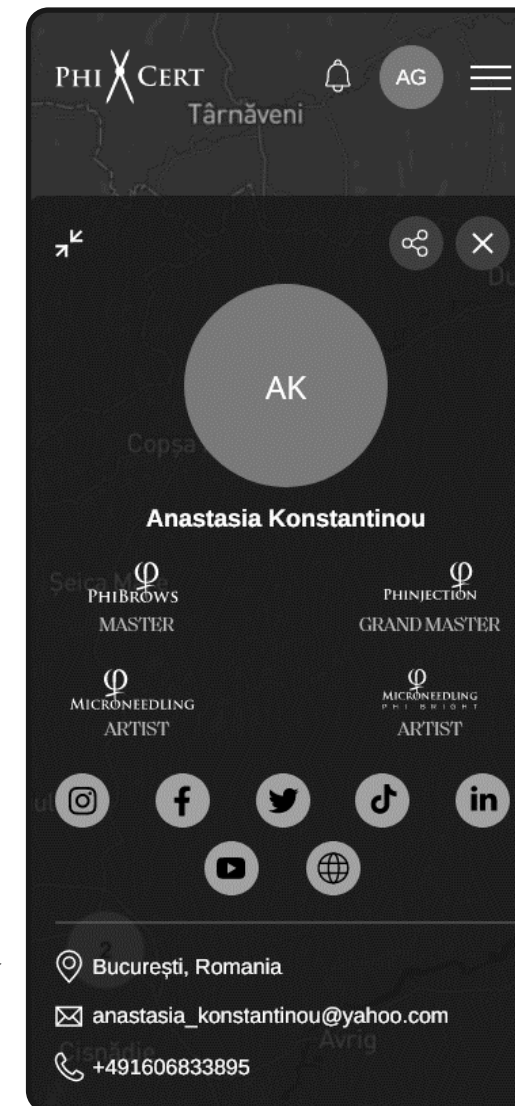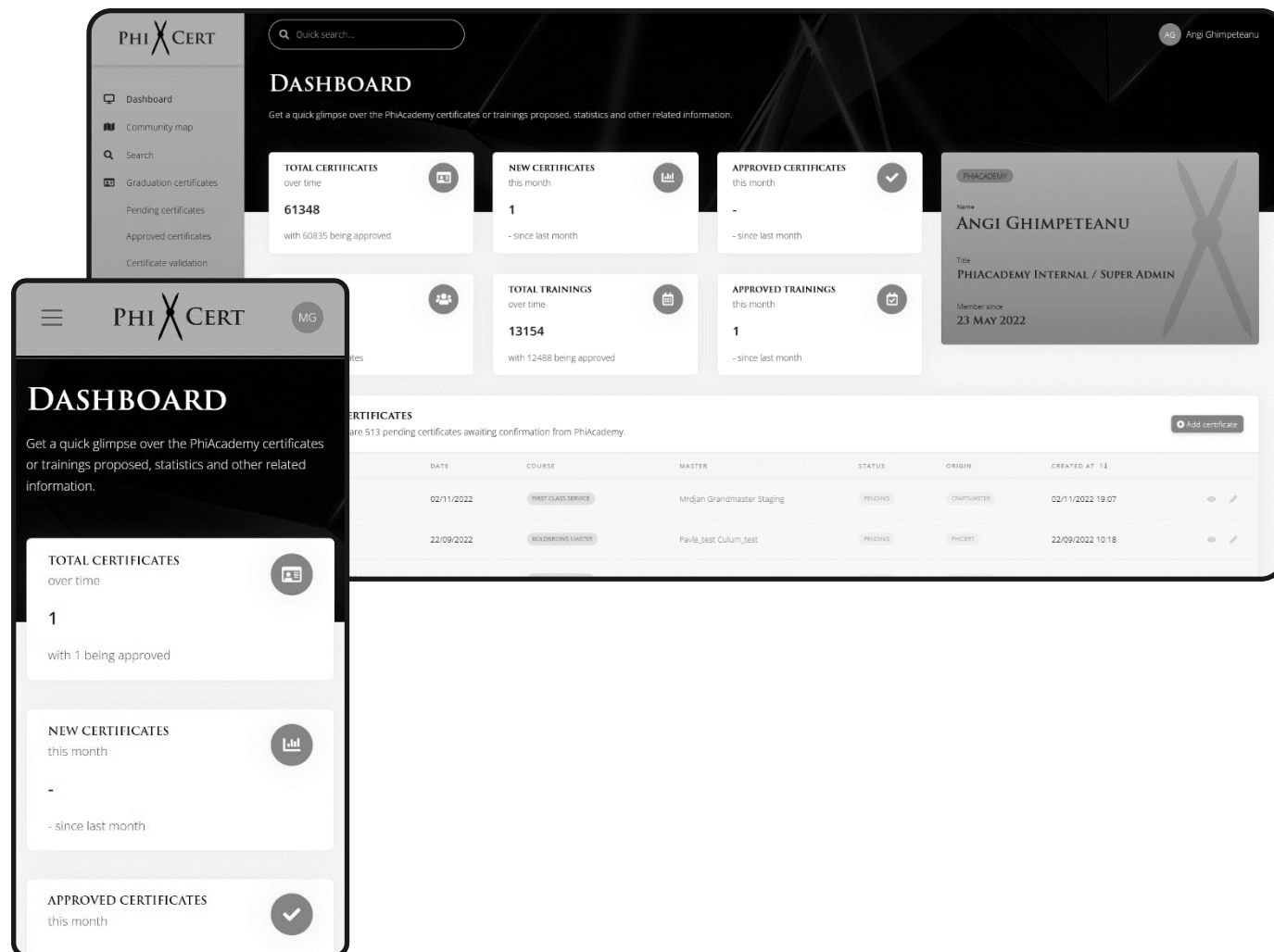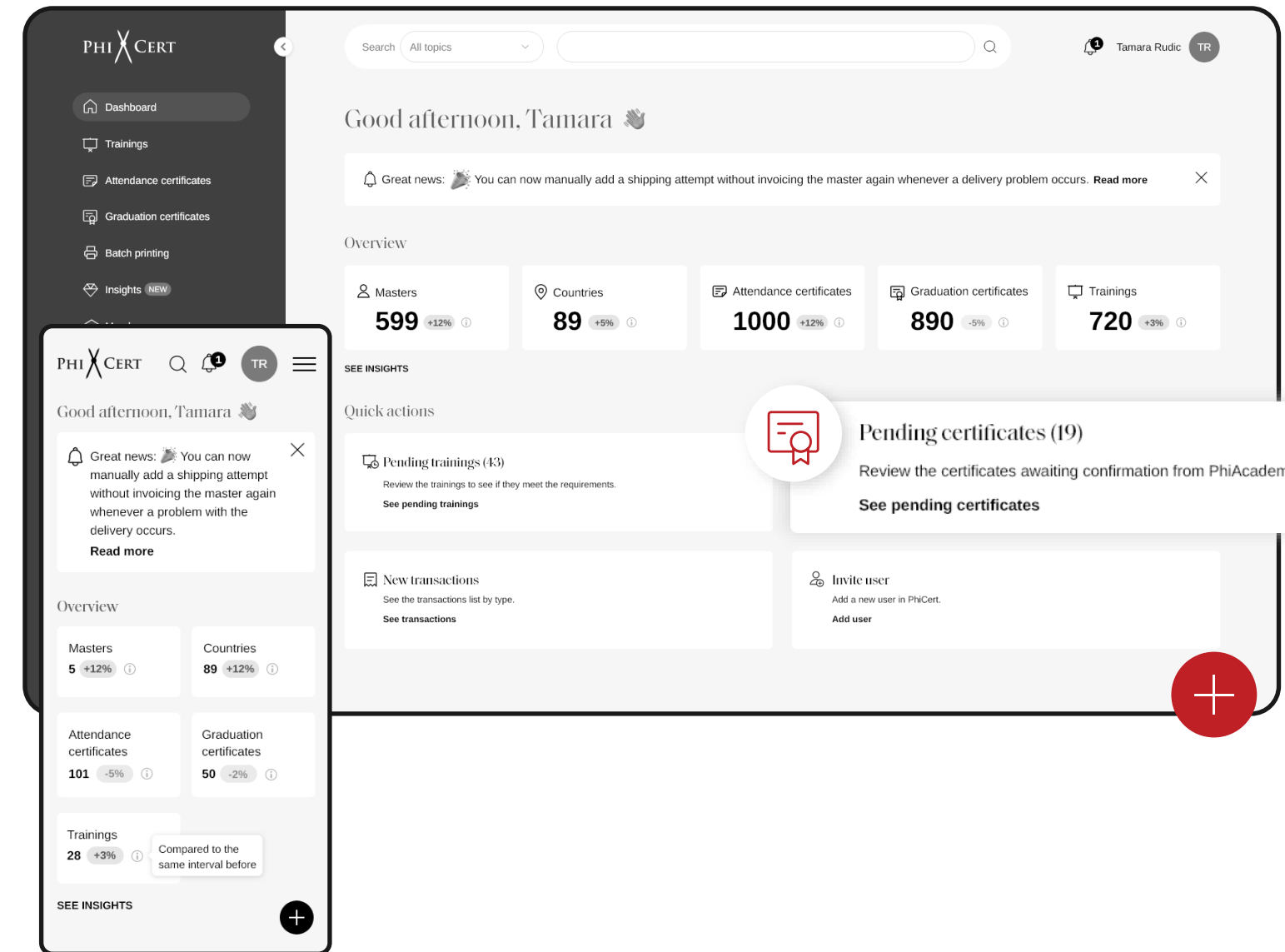
## Main achievements

Fully dedicated responsive mode, offering a native feel, means an improved experience and getting clarity on the go.

Replacing tables with cards provided easy access to the information, no matter the device.

A better information organization and adaptive layout improves the usability and task speed.
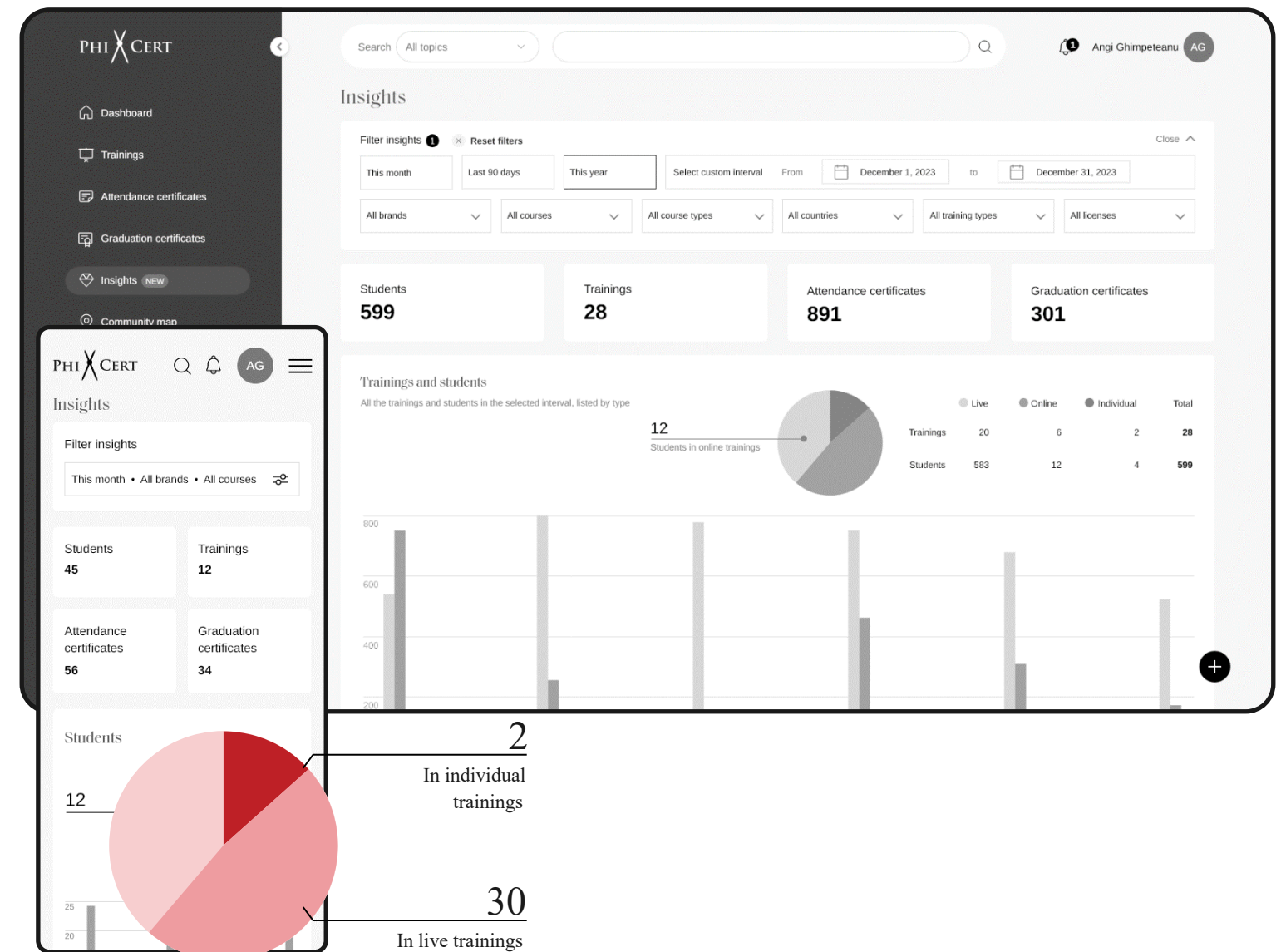
# PhiCert

# Main achievements

We redesigned the data-heavy insights section for 2 main user categories.

**Top management and super admins**

One of their needs was to get insights into how the platform is doing. A custom analytics and reporting tool.

**Masters**

Masters needed their own overview. Though we shared just the information they needed, to avoid cognitive overload.

# PhiCert

## Faster actions, less time

The impact on the admins' tasks was considerable, as they had a much quicker way of doing things.

The improved functionalities saved them many, many hours spent doing their job. The trainers got the improved features they needed, making their life easier. The application looked and performed better. Making all user groups happy improves the brand experience as well.

Receiving good feedback was the cherry on top.

"Everything seems great. These features would really help all of us and would make the entire process of approving graduation certificates much faster."
—Tamara, main admin

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"Sourcing International plays a key role regarding our current goal of digitalizing the educational activities organized by PhiAcademy on an international level. With the support received throughout the entire product development cycle, we were able to transform a core set of processes within just a few months. PhiAcademy established a certification platform able to handle more than 12,000 graduation certificates per year, aiding over 560 trainers around the globe as well as coordinating our internal teams in 2 different countries.

Soon after deploying a first stable release, we identified further opportunities and ideas together with Sourcing International that were then actively brought to life as additional units in the certification system to achieve a fully-fledged Educational Management Module entirely aligned with our organization's needs."
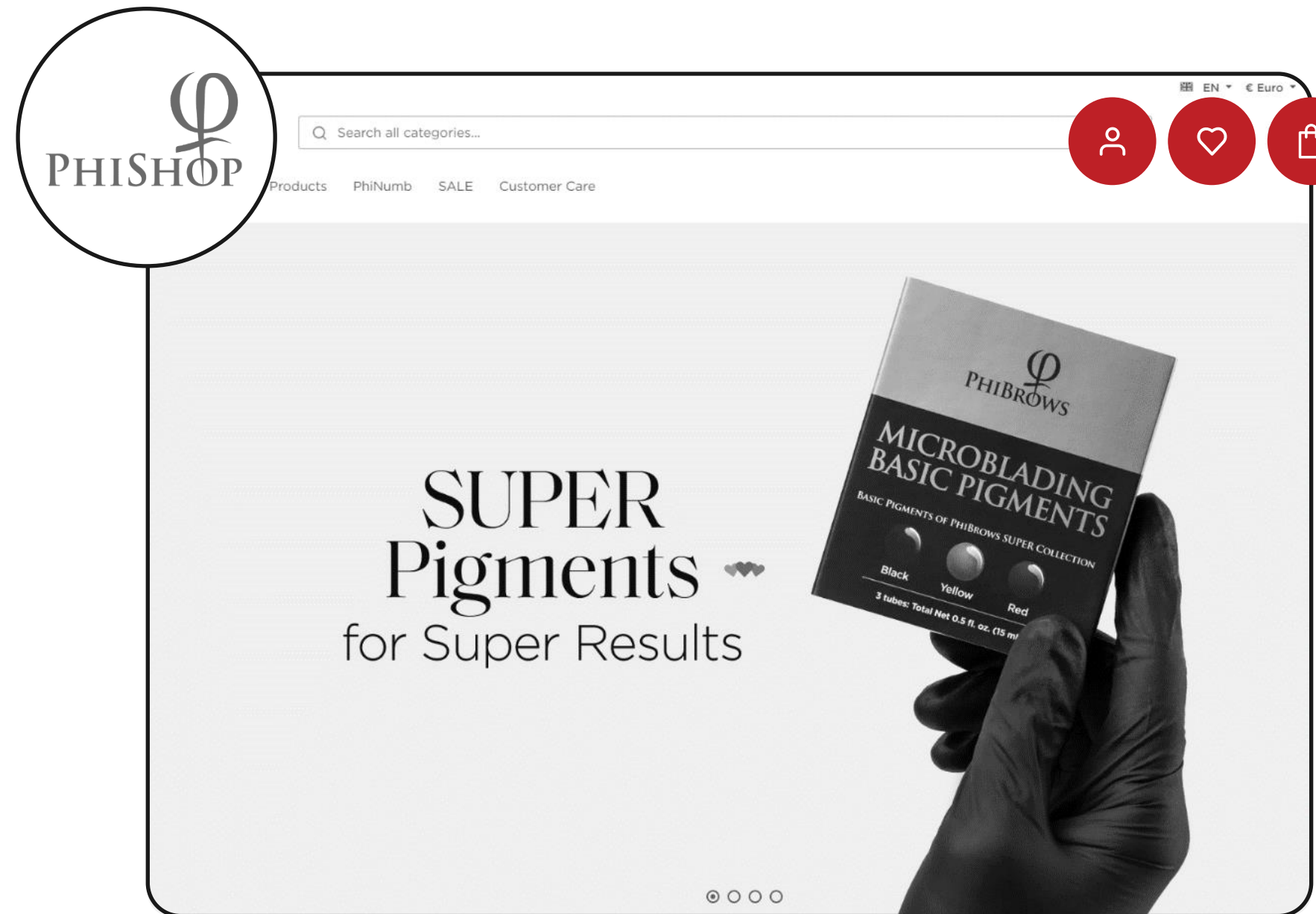
**Milan Momirovic,** Former CEO, PhiAcademy GmbH

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# PhiShop

# 04

# PhiShop

## Revamping an e-commerce platform to transform shopper's experience

PhiShop 2.0: Creating the foundation for seamless scalability and growth.

# PhiShop

We teamed up with one of the world's leading beauty companies in the permanent make-up sector, Shopware and Vanilla Reply to completely rebuild PhiAcademys B2B e-commerce platform from scratch to ensure seamless and sustainable scalability and growth.

The relaunch enabled efficient management of nearly 1,000 products in multiple languages, multiple currencies, multiple highly customized customer groups, and supporting international shipping and operations worldwide in over 160 countries with over 100K orders annually.

✓ 1,000 products

✓ 160+ countries

✓ 100K+ orders annually

# PhiShop

## Impact and numbers

Revenue increased by 132%

Conversion rate up by 26%

Session duration up by 25%

Transactions up by 6.5%

Bounce rate reduced by 11%

# PhiShop

## History

Founded in 2015, PhiAcademy pioneered a new approach to "Cosmetics," reintroducing the ancient art of "Microblading" to the modern world. With a focus on quality products and innovative training programs, particularly through online learning platforms, PhiAcademy redefined the traditional beauty profession, creating an enormous community of "PhiArtists" .

Today, PhiAcademy boasts a thriving global community of over 100.000 artists, operating in over 160 countries and continually expanding.

# PhiShop
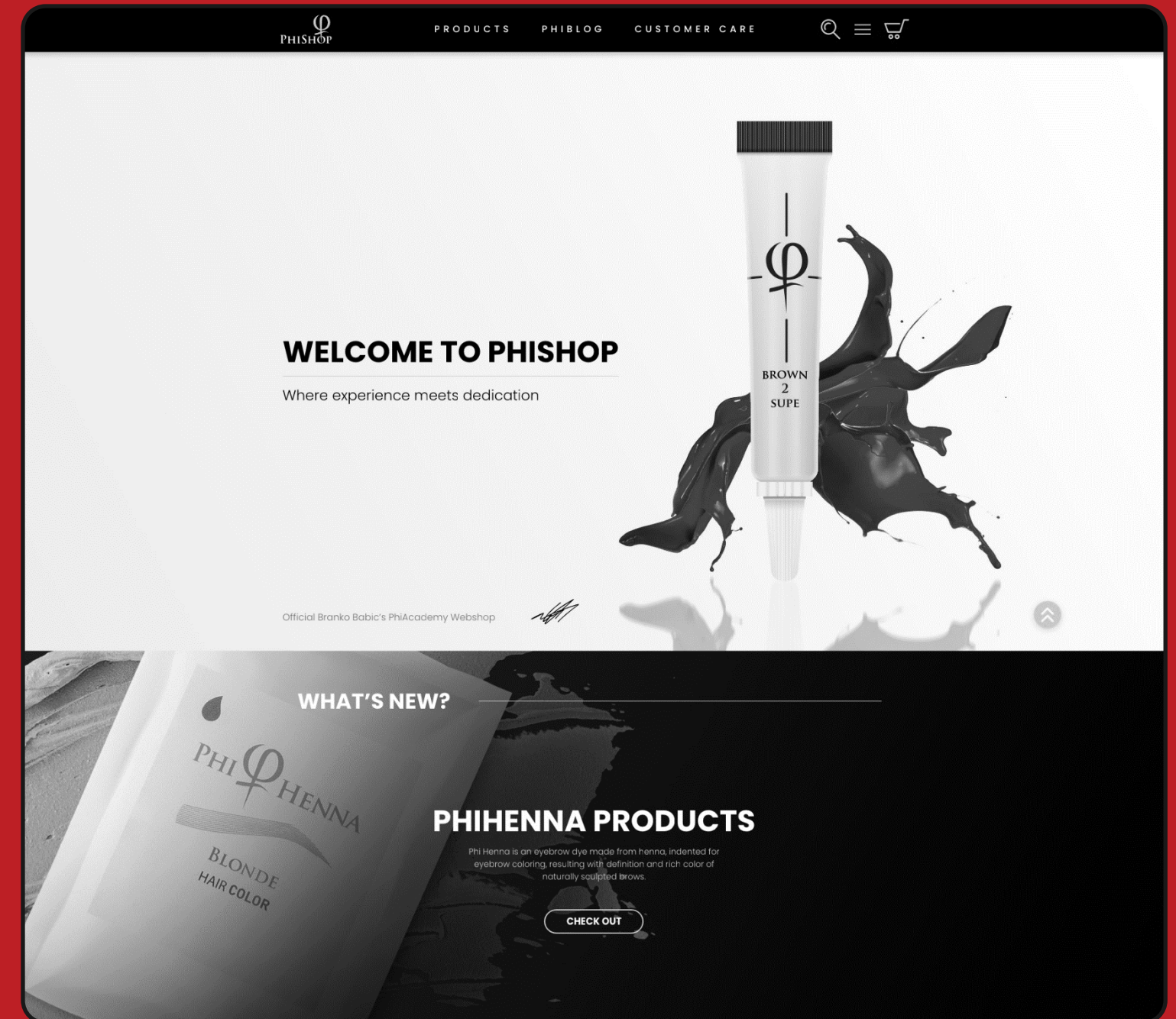
## Outgrowing the old e-commerce platform

Despite its success, PhiAcademy faced limitations with its Magento 2 eCommerce platform.

Multiple third-party-acquisitions and individual developments resulted in inflexibility and errors, particularly in managing customer-specific features. The need for a new system that seamlessly integrated with business operations and accommodated rapid growth became imperative.

It was time for a change.

# PhiShop
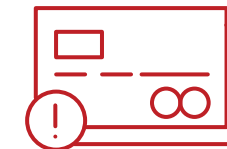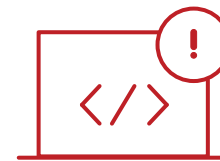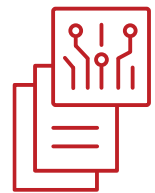
## Seeking a flexible, scalable, sustainable solution

The new system sought to integrate seamlessly with PhiAcademy's complex business structure, fostering innovation and accommodating the company's growth trajectory.

Streamlined processes, automated workflows, and enhanced user experiences were paramount. The ability to adapt quickly to changing requirements while maintaining quality standards was essential.

## From concept to reality: partnering for success

PhiAcademy sought a partner capable of delivering a performant, proactive, and constantly evolving PhiShop. For this, a complex tender was conducted to find a) the right software solution to build up upon and b) the right development partner to deliver and keep up with PhiAcademy.

The chosen agency would need to embrace complexity, demonstrate quality assurance, and provide extended support beyond standard business hours.
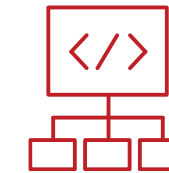
## Ideation & concept development

The design thinking approach and brainstorming sessions focused on scalability, user experience, and global reach, led to the adoption of Shopware 6 together with Platform.sh for its flexibility and rapid development capabilities. We were the first ones to ever do so in this context.

This combination enabled quick prototyping with automated testing, and Shopware's API-first approach allowed for easy automation and future enhancements.

# The result

From scratch to production in only 4 months. The new PhiShop prioritized mobile accessibility, with 80% of customers accessing the platform via mobile devices. Improved performance, enhanced user engagement and experience, and robust tracking capabilities were critical.

# PhiShop

## Main key results

- Support for 5+ customer groups with specific processes, pricing, checkouts, payment/shipment methods, and custom product visibility/buyability. Full system redesign for a seamless interface and improved usability.

- Support for six currencies and five languages

- Mobile-first (re)design combined with a hybrid mobile app for iOS & Android

- An automated VAT verification process with tax calculations accordingly supporting the OSS regulations

- An automated certificate verification processes

- Integration with the Banibis ERP system for seamless data flow

- Live price inquiry for express delivery

- An affiliate program
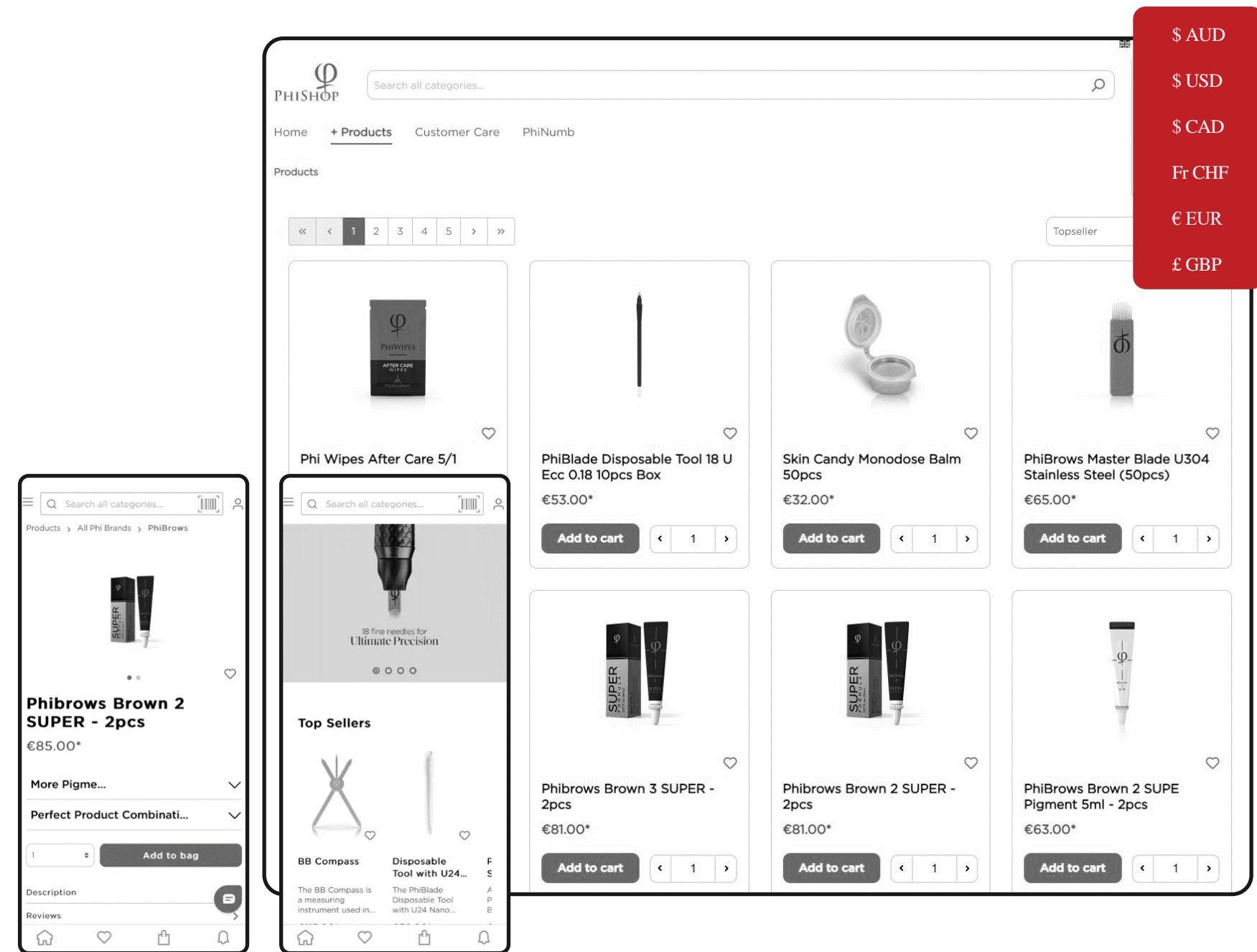
# PhiShop

## Improved metrics

The revamped e-commerce platform significantly increased site traffic, with metrics showing substantial improvements in session duration, conversion rates, and overall revenue.

## The future

User feedback highlighted enhanced usability, and future plans include further optimizing the user experience and expanding the product range.

# PhiShop

"Due to good cooperation and planning, we were able to change our shop to Shopware in a relatively short period of time."

**Paul Stuefer,** Former Head of E-Commerce & Marketing at PhiAcademy GmbH

# Thank you

**Sourcing International**

☎ +43 1 9346370

✉ office@sourcing-international.org

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